



FEMA

POSITION TASK BOOK FOR THE POSITION OF

National Qualification System
PROCUREMENT UNIT LEADER (SINGLE TYPE)

PROCUREMENT UNIT LEADER (SINGLE TYPE)

1. Competency: Assume position responsibilities

Description: Successfully assume the role of Procurement Unit Leader and initiate position activities at the appropriate time according to the following behaviors.

1a. Behavior: Obtain information relevant to position assignment

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
1. Determine charge code and delegation of AHJ to commit agency funds—or ensure that an AHJ procurement staff member is assigned to the incident if the agency cannot delegate procurement authority to the Procurement Unit Leader.	E, F, I		
2. Obtain and review necessary documentation: <ul style="list-style-type: none"> ● Copy of Delegation of Authority, Letter of Expectation, Letter of Agreement or Memorandum of Understanding (MOU) ● Applicable plans and reports ● Directories: phone, notification ● Written incident status summary ● Authorizations: cell phones, rental vehicles, computers 	E, F, I		
3. Obtain local administrative guidelines on procurement plan, agency-specific supplements, local procurement procedures, local payment procedures and pre-season agreements, ensuring stable pricing prior to an incident	E, F, I		
4. Obtain names, contact numbers and positions/functions of cooperating/assisting agencies to administer contracts.	E, F, I		
5. Receive briefing from Finance/Administration Section Chief or outgoing Procurement Unit Leader: <ul style="list-style-type: none"> ● Meetings and briefings schedule ● Situational assessment ● Incident objectives ● Strategy ● Hazards to incident personnel and public ● Agencies/jurisdictions involved ● Organizational structure ● Resources summary ● Logistical needs ● Ordering procedures ● Incident priorities and status: life safety, incident stabilization, property and environment ● Timing and scheduling ● Expected products 	E, F, I		

1b. Behavior: Establish or determine organizational structure, resource and staffing needs

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE

6. Evaluate staffing needs required to manage the unit: <ul style="list-style-type: none"> ● Ensure consistency with National Incident Management System (NIMS) organizational structure ● Identify training opportunities ● Ensure use of established procedures for ordering resources ● Request appropriate technical specialists to assist with special incident conditions 	E, F, I		
7. Utilize unit personnel: <ul style="list-style-type: none"> ● Establish appropriate organization and assign roles and responsibilities, while maintaining span of control 	E, F, I		

1c. Behavior: Ensure readiness for assignment

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
8. Arrive properly equipped at designated time and location and check in according to agency/organization guidelines <ul style="list-style-type: none"> ● Arrive with go-kit and any additional equipment ● Carry out check-in procedures and ensure assigned personnel do the same 	E, F, I		
9. Obtain complete incident and logistical information: <ul style="list-style-type: none"> ● Incident name, number, anticipated duration, size, type, responsibilities and expectations ● Reporting time and location ● Transportation arrangements and travel routes ● Contact procedures during travel (telephone/radio) ● Expected working conditions ● Personal Protective Equipment (PPE) ● Security measures ● Updated contact information and information links 	E, F, I		
10. Obtain, assemble and prepare information and materials for go-kit. The kit should contain critical items for the assignment and be easily transportable <ul style="list-style-type: none"> ● Supplies: <ul style="list-style-type: none"> ○ Office supplies appropriate to the function ○ Authority Having Jurisdiction (AHJ) identification badge and qualification card ● Reference materials: <ul style="list-style-type: none"> ○ Functional guidelines relative to incident type (agency guidance or other functional guidelines) ○ AHJ operations guides or other operational guides ○ Position manuals ● Forms: <ul style="list-style-type: none"> ○ Agency-specific forms appropriate to the function 	E, F, I		

2. Competency: Communicate effectively

Description: Use suitable communication techniques to share relevant information with appropriate personnel on a timely basis to accomplish objectives in a potentially rapidly changing environment.

2a. Behavior: Ensure the exchange of relevant information during briefings

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
11. Lead staff briefings and debriefings.	E, F, I		
12. Prepare for and participate in briefings: <ul style="list-style-type: none"> • Ensure briefings are accurate, timely and include appropriate personnel • Brief external support organizations • Share and evaluate information 	E, F, I		

3. Competency: Lead assigned personnel

Description: Influence, lead and direct assigned personnel to accomplish objectives and desired outcomes in a potentially rapidly changing environment.

3a. Behavior: Model leadership values and principles

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
13. Create a positive work environment <ul style="list-style-type: none"> • Communicate leader's intent and guidance • Manage unit and its activities effectively • Proactively assume responsibility for the unit and initiate action 	E, F, I		
14. Establish and maintain positive interpersonal and interagency working relationships: <ul style="list-style-type: none"> • Understand scope, roles, responsibilities, jurisdiction and authority of responding agencies 	E, F, I		
15. Exhibit principles of duty, respect and integrity as a leader.	C, E, F, I, J, T		
16. Understand and comply with NIMS/Incident Command System (ICS) concepts and principles: <ul style="list-style-type: none"> • Establish and modify an effective organization based on changing incident and resource conditions • Maintain appropriate span of control • Act as a representative of incident leadership 	E, F, I		

3b. Behavior: Communicate incident priorities and supervise personnel

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
17. Communicate with assigned personnel: <ul style="list-style-type: none"> • Communicate priorities, objectives, strategies and any changes • Inform personnel of their assigned tasks and expectations • Clearly explain conflict resolution procedures and ensure that personnel understand\ • Ensure that assigned objectives and expectations for the operational period are reasonable and accurate 	E, F, I		
18. Ensure debriefings occur and participate as necessary: <ul style="list-style-type: none"> • Ensure incident situation status information is current and complete 	E, F, I		
19. Ensure that staff follows all applicable agency/jurisdiction policies, contracts, standard operating procedures and agreements <ul style="list-style-type: none"> • Federal, state, local, tribal, territorial and regional relationships, as appropriate • Roles and responsibilities of potential responder agencies • Scope, jurisdiction and authority of potential responder agencies' contingency plans 	E, F, I		

20. Supervise and hold personnel accountable for executing assigned tasks: <ul style="list-style-type: none"> ● Identify and promptly resolve disagreements, issues and misunderstandings ● Prioritize work while considering immediate support for incident operations 	E, F, I		
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3c. Behavior: Ensure the health, safety, welfare and accountability of assigned personnel

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
21. Demonstrate knowledge of and comply with relevant health and safety requirements <ul style="list-style-type: none"> ● Direct and oversee unit operations to ensure compliance with health and safety considerations and guidelines ● Coordinate with the Safety Officer to ensure that assigned personnel follow safety guidelines 	E, F, I		
22. Evaluate mental and physical fatigue of assigned personnel: <ul style="list-style-type: none"> ● Ensure adequate rest is provided to section personnel 	E, F, I		
23. Recognize potentially hazardous situations, inform assigned personnel of hazards and take precautions to mitigate risk <ul style="list-style-type: none"> ● Adjust operations in response to hazards, weather and other relevant events 	E, F, I		
24. Report or explain the procedures for reporting unexpected occurrences, such as fire, death, injury, illness, exposure to pathogens or hazardous materials (HAZMAT), accident, political contact or property loss or damage: <ul style="list-style-type: none"> ● Ensure report contains nature of event, location, magnitude, personnel involved and initial action taken (such as helicopter picking up injured or an appropriate subsequent action) ● Ensure the protection of Personally Identifiable Information (PII) while reporting ● Obtain information from the following sources regarding special hazards, threats or unexpected occurrences: subordinates, personal observation, other incident personnel and off-incident personnel 	E, F, I		

3d. Behavior: Identify opportunities and meet requirements to provide equal access and reasonable accommodation in all activities

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
25. Demonstrate the ability to assess and monitor for physical access, programmatic access and effective communications access	E, F, I, J		
26. Demonstrate the ability to identify opportunities for universal accessibility	E, F, I, J		
27. Provide equal access, disability accommodations and access and functional needs (AFN) accommodations.	E, F, I, J		

4. Competency: Conduct operations and ensure completion of assigned tasks

Description: Identify, analyze and apply relevant situational information and evaluate actions to complete assignments safely and meet identified objectives. Complete actions within established time frame.

4a. Behavior: Develop and implement plan

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
28. Approve completed plans: <ul style="list-style-type: none"> ● Ensure plan is complete, accurate, realistically attainable and relevant to the incident objectives 	E, F, I		
29. Develop and update assessments of current and anticipated procurement needs and resource requirements.	E, F, I		
30. Ensure development of incident procurement plan and policies: <ul style="list-style-type: none"> ● Spending caps ● Necessary forms ● Identifying personnel with purchasing authority ● Process for obtaining approval to exceed caps ● Process for coordinating with other units, groups, branches or sections ● Emergency purchase orders ● Blanket purchase agreements ● Field purchase orders ● Credit cards ● Airfare and taxi fare 	E, F, I		
31. Participate in the planning process <ul style="list-style-type: none"> ● Prepare for and participate in planning meetings ● Assist in the development of plans, as necessary: <ul style="list-style-type: none"> ○ Long-range ○ Strategic ○ Contingency ○ Demobilization ○ Continuity of Operations Plan (COOP) 	E, F, I		
32. Review, validate and modify plans: <ul style="list-style-type: none"> ● Analyze alternate strategies and explain decisions ● Validate or revise unit objectives ● Review information covering health and safety principles, known hazards and importance of all periods ● Validate unit organizational structure ● Validate unit resource assignments ● Review reserve resources ● Evaluate immediate support needs 	E, F, I		

4b. Behavior: Set the unit priorities

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
33. Analyze work assignments and staffing levels to ensure achievement of unit objectives.	E, F, I, J		

34. Attend and participate in strategy meetings as necessary: <ul style="list-style-type: none"> ● Assess organizational needs ● Identify additional resource needs ● Identify critical factors to ensure unit success ● Prioritize incident and unit objectives 	E, F, I		
35. Disseminate priorities and expected completion timelines to staff.	E, F, I		
36. Hold staff accountable for communicated priorities and deadlines.	E, F, I		

4c. Behavior: Coordinate with all appropriate personnel and stakeholders

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
37. Establish effective relationships and coordinate with incident personnel: <ul style="list-style-type: none"> ● IMT personnel ● Other supporting personnel 	E, F, I		
38. Establish effective relationships with stakeholders and partners in the impacted jurisdiction(s).	E, F, I		
39. Provide cost data from rental agreements and contracts to the Cost Unit Leader or appropriate personnel, according to reporting time frames for operational period.	E, F, I		

4d. Behavior: Apply agency policy, contracts and agreements

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
40. Complete all work according to organization/agency direction, policy and incident objectives: <ul style="list-style-type: none"> ● Ensure that personnel complete all documentation requirements according to organization/agency direction, policy and incident objectives 			
41. Demonstrate knowledge of and apply relevant legal, regulatory and fiscal constraints	E, F, I		

4e. Behavior: Ensure documentation is complete

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
42. Ensure that hard copies and electronic copies of emergency procurement policies, procedures and reference materials are accessible.	E, F, I		
43. Maintain and collect personal records related to incident: <ul style="list-style-type: none"> ● Time sheets ● Rental records ● Accident forms ● Property records <ul style="list-style-type: none"> ○ Equipment time records ● Receipts 	E, F, I		

44. Maintain and submit incident records for events, personnel, equipment, supplies and other data for incident management needs: <ul style="list-style-type: none"> • Property loss/damage reports • Agency-required incident reports • Activity log • Changes in strategy and tactics 	E, F, I		
45. Review documents for accuracy, timeliness and appropriate distribution	E, F, I		

4f. Behavior: Administer, manage and apply agency policy, contracts and agreements

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
46. Account for all contractors and ensure they document time	E, F, I		
47. Complete final processing, send documents for payment and ensure payment of approved invoices	E, F, I		
48. Determine current blanket purchase order (PO) list	E, F, I		
49. Determine current vendor list and make contact as necessary	E, F, I		
50. Determine timelines for reporting cost information	E, F, I		
51. Evaluate and analyze information regarding procurement requests	E, F, I		
52. Facilitate and track bid processes for open procurements.	E, F, I		
53. Identify resources assigned to the incident to determine contract status	E, F, I		
54. Maintain final incident documents <ul style="list-style-type: none"> • Obtain copies of all vendor invoices • Verify that all equipment time records are complete • Maintain comprehensive audit trail for all procurement documents • Check completeness of all data on vendor invoices • Compare invoices against procurement documents • Ensure that only authorized personnel initiate orders 	E, F, I		
55. Prepare and post procurement documents in accordance with agency rules and delegated authority: <ul style="list-style-type: none"> • Record-keeping system • Equipment use invoices • Equipment use records • Land use agreements • Equipment rental agreements • Contracts • Additional applicable documents 	E, F, I		
56. Prepare and sign contracts, land use agreements and cost sharing agreements, as necessary	E, F, I		
57. Prepare and sign off on rental agreements, as appropriate: <ul style="list-style-type: none"> • Ensure that equipment rental agreements and use statements include hourly rates, terms, conditions of use and procedures for equipment arrival at incident 	E, F, I		
58. Provide programmatic and operational technical assistance to internal and external stakeholders: <ul style="list-style-type: none"> • Procurement of contracts • Procurement of materials 	E, F, I		

59. Verify all invoices	E, F, I		
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5. Competency: Prepare for demobilization/transfer

Description: Demobilize position and transfer position duties

5a. Behavior: Transfer position duties while ensuring continuity

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
60. Complete all necessary reports and narratives following common standards before turnover: <ul style="list-style-type: none"> ● Activity log ● Shift change ● End of operational period ● Reassignment ● Deactivation/demobilization 	E, F, I		
61. Complete the process for demobilizing position responsibilities: <ul style="list-style-type: none"> ● Brief and provide complete and accurate records to relief personnel ● Discuss equipment release considerations ● Provide information to supervisor to assist with decisions on release priorities ● Coordinate with appropriate partners regarding demobilization procedures ● Brief personnel on demobilization responsibilities ● Ensure personnel demobilize in a timely and complete manner ● Emphasize safety and accountability during this phase of operations 	C, E, F, I, J, T		
62. Coordinate an efficient transfer of position duties when deactivating or demobilizing resources: <ul style="list-style-type: none"> ● Inform assigned personnel ● Notify incoming personnel when and where transition of positions will occur ● Conduct transition effectively ● Document follow-up action and submit to agency representative 	E, F, I		
63. Participate in transition or incident closeout: <ul style="list-style-type: none"> ● Conduct debriefings with agency administrator(s) as requested ● Close out incident as appropriate for the AHJ 	E, F, I		

5b. Behavior: Plan for demobilization and ensure staff follow demobilization process

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
64. Participate in the development, approval and implementation of the demobilization plan: <ul style="list-style-type: none"> ● Coordinate with appropriate partners regarding demobilization procedures ● Coordinate needs and responsibilities 	E, F, I		